Sec	uon A. muoduction	
A-1.	Systems Development Perspective	8
A-2.	Current Release Notes	9
A-3.	Logging in to DOCLINE	10
A-4.	Library Identifier	10
A-5.	Important Links	11
	Section B. Institution Record: Search	
B-1.	Search Records: by LIBID, Institution Name, or Contact Name	14
B-2.	SearchBuilder: Find institutions by Multiple Search Criteria	18
B-3.	Change View Options for SearchBuilder Results	22
B-4.	Change Output Display for Search Results	24
B-5.	Modify Your Search Query	28
B-6.	Add Institutions Direct from SearchBuilder to Routing Table	32
B-7.	Add Institutions Direct from SearchBuilder to M/A/N Map	37
B-8.	Print Search Results	38
B-9.	Download Search Results	39

	Section B. Institution Record: Update	
B-10.	Update Addresses	40
B-11.	Update People (Contacts)	41
B-12.	Manage Importing / Exporting Serial Holdings	43
B-13.	Review Serial Holdings	45
B-14.	Modify Institution ID's (OCLC. FEIN, MARC)	46
B-15.	Modify Interlibrary Loan Service Options	47
B-16.	Modify Copy Service Options and Fees	48
B-17.	Modify Loan Service Options and Fees	50
B-18.	Modify Loansome Doc Service Options	53
B-19.	Modify Library Service Options	54
B-20.	Set Default Values to Route New Requests	55
B-21.	View Institutions with Your LIBID in Their Routing Table	58
B-22.	Modify Delivery Methods	59
B-23.	Update Routing Table	60
B-24.	Update M/A/N Map	68

TABLE OF CONTENTS

Section C. Serial Holdings

C-1.	Update Holdings	76
C-2.	Bibliographic Information	85
C-3.	Search Limits	86
C-4.	Add a record to Serial Holdings	88
C-5.	How to Search Serial Holdings	92
C-6.	Serial Holdings Bibliographic Record Selection	99
C-7.	Serial Holdings Lookup LIBID	100
C-8.	Serial Holdings Record Display	102
C-9.	Serial Holdings Record Update	102
C-10.	Serial Holdings Region Search Limit	104
C-11.	Serial Holdings State / Province Search Limit	105
C-12.	Serial Holdings Library Group Search Limit	105
C-13.	Serial Holdings View Record Display	105

	Section C. Serial Holdings: Reporting	
C-14.	Serial Holdings Report Overview	106
C-15.	Review / Cancel Submitted Reports	106
C-16.	NLM Serial Title Changes Report	107
C-17.	Serial Holdings by Library Report	108
C-18.	Serial Holdings Outside of Publication Date Report	108
C-19.	Serial Holdings Level 2 Holdings Report	110
C-20.	Serial Holdings Libraries not Updated Within Year Rpt	111
C-21.	Reports Ready	112
C-22.	Serial Report Field Definitions	114
C-23.	Types of Serial Reports	116

	Section D. Requests:	Borrow
D-1.	Request Material by Unique Key by PubMed Search by LOCATORplus by Manual Citation	119
D-2.	Transfer Loansome Doc Requests	130
D-3.	Change Requestor	131
D-4.	Route Serial Requests	133
D-5.	Route Non-Serial Requests	133
D-6.	Change the Routing of Requests	134
D-7.	Receive Requests	135
D-8.	Time-Triggered Actions	136
D-9.	Print Requests	138
	Section D. Requests	s: Lend
D-10.	Lend	139
D-11.	Fill Requests	140
D-12.	Reject Requests	141

	Section D. Requests: Manage	
D-13.	Find Requests	142
D-14.	Cancel Requests	143
D-15.	View Routing History	144
D-16.	Determine the Status of a Request	145
D-17.	Resubmit Retired Unfilled Requests	146
	Section D. Requests: Report	
D-18.	ILL Statistics and Reports	150
D-19.	View and Print Reports	151
D-20.	Download Reports	152
	Section E. Loansome Doc Patror	ns
Ξ-1.	Search for LD Patrons at My Institution	154
Ξ-2.	Loansome Doc Patron Categories	157
Ξ-3.	Update a Patron's Record	158
Ξ-4.	Loansome Doc Passwords	159
≣-5.	Block a Patron's Loansome Doc Requests	159



SECTION A. Introduction A-1. **Systems Development Perspective** 8 A-2. **Current Release Notes** 9 A-3. Logging in to DOCLINE 10 10 A-4. **Library Identifier** 11 **Important Links** A-5.

A-1. Systems Development Perspective

DOCLINE is the National Library of Medicine's automated interlibrary loan request routing and referral system. The primary purpose of the system is to provide improved document delivery service among libraries within the NN/LM.

DOCLINE was first introduced in March,1985,; the system has gone through numerous revisions. The most significant technological leap so far had occurred in 2000, when it transitioned from a Telnet-based to a Web-based system. In 2003, the first installment of a complete rewrite of the web-based system was released into production. Revision and continued improvement of the system will occur, both as new information technologies emerge and the needs of libraries and their patrons evolve.

Version	Description	Date (Mo/Yr)
0.0	First launched via Telnet	Mar, 1985
1.0	First introduced on the Internet/web	Jun, 2000
1.3	Enhancements	Sep, 2001
1.4	Enhancements	Sep, 2002
1.5	Enhancements	Mar, 2003
1.5.1	Enhancements	Apr, 2003
1.6	Enhancements	Jun, 2003
2.0	Major web redesign - Institution Record	Dec, 2003
2.1	Major web redesign - Loansome Doc Patrons	Apr, 2004
2.2	Enhancements OCLC-DOCLINE Batch Update Program	Aug, 2004

A-2. DOCLINE® 2.2 Release Notes

Requests: Borrow

- Added an alert when an article being ordered is epub ahead of print.
- Expanded the free alert message to include items in PubMed Central that are not yet in PubMed.
- Added ability to sort citations on Process PubMed page by article author or article title. Default sort is PMID.
- UniqueKey: Added ability to retrieve titles by searching truncated journal titles.
- Receipt: Added epub ahead of print to end of citation when applicable.
- Lend (Batch): Added ability to indicate lender use of different delivery method.

Note: Lenders should only deliver via requested delivery method.

Serial Holdings

 Added ability to search by truncated journal title on both View and Add/Update screens.

Reports

Modified name of Report 1-7 to "Library Routing table and M/A/N Map cells containing my LIBID."

Help

 Help screens and FAQs were added or modified for all new features or changes to DOCLINE 2.2.

Loansome Doc for LD Patron

- Added an alert when an article being ordered is epub ahead of print.
- Receipt: Added epub ahead of print to end of citation when applicable.
- Expanded free alert message to items in PubMed Central not PubMed.
- Added text links to PubMed and PubMed History at the bottom of the LD Order Confirmation page.
- Find a Library: Changed search results for international users to group libraries by Country, then sorted by Institution Name. If libraries exist in an international user's own country, those libraries are displayed first, followed by other countries.

A-3. Logging in to DOCLINE



- If you forget the UserID and/or Password, contact your DOCLINE Coordinator.
- NLM only offers support to the following Web browsers:
 - Internet Explorer 6.x
 - Internet Explorer 5.5 SP2
 - Netscape 7

A-4. Library Identifier

Each institution record in DOCLINE is identified by a unique library identifier called a LIBID.

The LIBID consists of six alphabetic characters. For U.S. and Canadian institutions, it starts with a two-letter US MARC Geographical Code (U.S. State or Canadian Province code), followed by a "**U**" for U.S. or a "**C**" for Canada and three unique alphabetic characters.

The LIBID for other countries consists of the first two letters of the Universal Postal Union (UPU) code, followed by the letter "X" and three unique alphabetic characters. *Once a LIBID has been assigned to a library, it cannot be changed.*

A-5. Important Links

NN/LM-NER Web Site:

http://www.nnlm.gov/ner/DocumentDelivery.html

NN/LM Online HOLD Request Form:

http://nnlm.gov/libinfo/DOCLINE/dochold.html

NLM Web Site (DOCLINE Help):

http://www.nlm.nih.gov/docline/doclinehelp/%21SSL%21/WebHelp/DOCLINE Help.htm

NLM Web Site (DOCLINE FAQ's):

http://www.nlm.nih.gov/services/faqdocline.html

END OF SECTION A

